Quick Reference Guide: Updating Withholding Elections (W-4)

Keep in Mind

- Federal and state withholdings can be updated electronically in Workday. This Quick Reference Guide covers both activities.
- You may update your withholding elections at any time.

Information Needed

- Effective date
- Marital status
- Desired federal withholding elections
- If filing in Illinois, the IL State W-4:
  http://finserv.uchicago.edu/payroll/forms/IL-W-4.pdf

Steps for updated federal withholdings:

1. From the Home Page, click on the View All Apps link (in the Quick Tasks section.) Click on the Pay app.

2. Under the Actions header, click Withholding Elections.
3. From the Withholding Elections page, you can view and update (if applicable) the following elections:

   **Federal Elections**
   **State Elections** (not applicable to all states)

   **Local Elections** (not applicable to all localities)
   **Tax Allocations** (do not edit unless specifically instructed)

4. To update Federal Elections (your federal W-4), click the **Update** button.

5. On the next screen, ensure the **Company** field is set to **University of Chicago** and the **Effective Date** is today. Please do not use an effective date in the past. Click **OK**.
6. Review the help text and then scroll down to the W-4 Data section. Complete the Federal W-4 form by updating the following where applicable:

- Marital Status – use the Prompt Icon to select your marital status. This field is required.
- Multiple Jobs or Spouse Works
- Number of Qualifying Children Under Age 17
- Number of Other Dependents
- Override Total Dependent Amount
- Other Income (not from jobs)
- Deductions
- Extra Withholding – additional amount, if any, you want withheld from each paycheck
- Exempt – check this box if applicable
- Nonresident Alien checkbox – check this box if applicable

(Please note that the fields and available values on the federal W-4 are subject to change by the federal government. If there has been a recent change in the federal W-4, the fields above may not be accurate. Please reach out to the Payroll department if you have questions.)

7. Click the I Agree checkbox, then click OK to successfully complete the task.
Steps for updating State Withholdings:

1. Follow steps 1-3 above to reach the Withholding Elections screen, then select the State Elections tab. Click the Update button at the bottom of the page to change your withholding elections. You may need to scroll down.

2. On the next screen, ensure the Company field is set to University of Chicago and the Effective Date is today. Please do not use an effective date in the past.

3. Carefully review the help text, and then select the State where you would like to complete withholding elections, and (if applicable) the Withholding Form Type. Not all states offer tax withholding, and not all states have multiple withholding form types. Click OK to proceed.

4. The fields and values that appear on the next screen will depend on the selections made in the previous step. If you are unsure how to fill out the withholding form, you can click the View Blank Form button for a PDF copy of the paper version of the form, or contact the Payroll department.

5. Click the I Agree checkbox, then click OK to successfully complete the task.